

HR/Payroll AST Leads Meeting January 7, 2010

Adjutant General's Auditorium





INTRODUCTION Pat O'Cain, Deputy Division Director





Mission and purpose



The South Carolina Enterprise Information System will standardize and streamline business processes within the government of South Carolina, using best business practices to achieve cost-effective and efficient delivery of services.

Timely, accurate and complete information provided through SCEIS will empower decision-makers, insuring transparency and improving the way government works for the citizens of South Carolina.



Agenda



- Introduction
- HR/Payroll Welcome
- Compare Learned
 © Lessons Learned
- Oata Cleansing
- Workforce Transition & Training Lessons Learned
- @ Agency Support Team & MySCEmployee
- Timeline & Upcoming Activities



Wave 1 Success



- 30 agencies live on HR/Payroll, as planned, December 2, 2009
- 2,400 employees paid through the SCEIS system on January 1
- Over 80% of Wave 1 agencies logged onto MySCEmployee prior to January 1, exceeding average for SAP implementations which is typically 30%



Wave 2 Go-Live: June 2, 2010



Timeline adjustment due to:

- Continuing to transition to Finance / Materials Management
- Overburdened resources due to budget cuts
- Installation of SAP maintenance packages, which include upgrade to support Internet Explorer 8





HR/PAYROLL WELCOME Sam Wilkins, OHR





HR/PAYROLL LESSONS LEARNED Jennifer Lauer, HR/Payroll lead





Keys to Success



- The SCEIS team and the agencies share a common goal – to pay our employees correctly.
- Take advantage of the MySCEmployee Road shows for employees and managers.
- Attend training per your individual transition plans.
- Participate in all ready room activities.
- © Encourage your employees to log onto MySCEmployee and validate all of their personal details well in advance of the first SCEIS Payroll.



Lessons Learned – Payroll



- It is important for agencies to spend the requisite time to validate all of their data prior to cutover.
- Agencies need to focus on the Role Mapping activities to ensure proper role assignment ties to job function.
- Prior to go-live it would be beneficial for agencies to validate employee's gross pay, deductions, benefits, additional withholding amounts, working time, etc.
 - SCEIS will provide to the agencies some of the requisite reports to complete this task.
- Agencies must validate upon go-live that activities that occurred during the freeze period resulted in correct information loaded into SCEIS. This will help ensure employees get paid properly.



Lessons Learned – Personnel Admin & Organization Mgmt.



Personnel Administration:

- Validate Social Security numbers in HRIS against CG Payroll thoroughly
- Validate and update Employee Grievance Codes
- Validate employee pay in HRIS against CG Payroll thoroughly and resolve any discrepancies

Organizational Management:

Agencies need to ensure that data cleansing items have been completed in HRIS to allow for the creation of proper organizational structure in SCEIS



Lessons Learned – Time Management



- Agencies need to validate that they have mapped their employees to the proper work schedule. This is important to ensuring employees get compensated properly.
- Agencies need to properly maintain historical leave balances in legacy systems (i.e., HRIS, eLeave, etc.) in order to convert correctly into SCEIS at cutover. After cutover, please ensure that all leave balances have converted correctly.



HR/PAYROLL DATA CONVERSION and CLEANSING OVERVIEW Jennifer Lauer, HR/Payroll lead





Importance of Data Conversion and Cleansing Activities



- Oata cleansing is one of the most important activities for data conversion
- Data cleansing is the process of reviewing and maintaining legacy application data so that it can be converted into SCEIS without intervention at final conversion time
- Cleansing of the data must occur prior to loading it into the SCEIS production environment
- Coading poor quality data into SCEIS could result in incorrect business decisions and may be more difficult to correct later



Data Cleansing - Guiding Principles and Assumptions



- Agencies will cleanse their own data
- Legacy data must undergo data preparation to improve quality, minimize data integrity issues and reduce data volume and extract program run time
- Agencies will be responsible for preparation of master data and transactional data to be converted into SCEIS
- If necessary, agencies will be required to supply additional resources to complete high volume, low complexity manual preparation activities



Data Cleansing - Guiding Principles and Assumptions, cont.

- Agencies will ensure that extracted data is validated before and after the data is loaded into SCEIS
- SCEIS functional teams will provide the data requirements and the corresponding support to assist agencies in mapping data fields from existing legacy systems to SCEIS



Cleansing Data from Legacy Systems



- Much of the required information that needs to be in SCEIS is already housed in legacy systems
- Several systems will be used to obtain the base information to be validated and cleansed for entry into SCEIS:
 - The state Office of Human Resources' HRIS
 - The CG's Central Payroll system
 - State Treasurer's Office system to obtain direct deposit/banking information for employees who have selected a bank for direct deposit of their pay



General Readiness Recommendations



- While your agency prepares for the transition to the SCEIS HR/Payroll system, there are some preparatory activities that may help you:
 - Determine workflow impact on HR/Payroll employees
 - Review the workflow impacts among your staff in HR, Time Management, and Payroll to determine responsibility for validating information and ensuring quality control
 - Document current workflow processes to prepare for mapping HR and payroll employees' future system roles
 - Review your agency's policies and procedures to ensure compliance.
 - Existing policies may need to be updated. Some changes may require approval from the Office of Human Resources



General Readiness Recommendations, cont.



- A few additional preparatory recommendations:
 - Accurate and timely processing of HR and payroll transactions
 - Consideration should be given to agency payroll schedules and data entry, especially for agencies with manual timesheet processing and payroll lags for temporary employees
 - Document imaging
 - Agencies should consider strategies to prepare for the new business process in SCEIS that allows for certain personnel records to be imaged and stored in SCEIS



WORKFORCE TRANSITION / TRAINING LESSONS LEARNED

Jennifer Rocks, EC&C Advisor





R WFT Documents Distributed



Agency Advocates sent an email Dec. 17-18:

- 1. HR/PY Organizational Impact Assessments (OIA)
- 2. HR/PY Role Descriptions
- 3. HR/PY Organizational Impact Assessment Instructions
- 4. HR/PY Organizational Impact Assessment Worksheet for agency
- 5. Wave 2 Business Area and Role Summary



B WFT Initial Steps



- 1. Review documentation and distribute to appropriate HR/PY subject matter experts
- Review Attachment 5 and estimate number of employees per business area via SurveyMonkey (http://www.surveymonkey.com/s/2X3LDC9) by Friday, January 8
- 3. Review HR/PY process flows on SCEIS website
- Use the attachments to complete Attachment 4, HR/PY Organizational Impact Assessment worksheet to <u>sceis-ast@sceis.sc.gov</u> by Friday, January 8

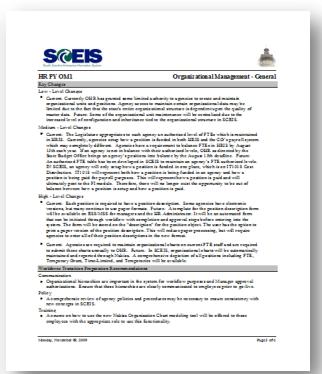


Organizational Impact Assessment Overview



- Provides a description of the future state, in terms of impacts to Communication, Organization, Policy, Training and Workload
- © Describes key changes, and provides insight into processes that affect role mapping decisions
- @ Identifies areas that may require immediate attention or planning prior to Go-Live







Important Organizational Impact Assessment Feedback



- Estimated number of employees who will need to enter time in MySCEmployee
- Impact of employees who will use MySCEmployee to enter time and travel
- Cocations of end-users who may require instructor-led training
- Computer skills of employees who will use MySCEmployee
- Considerations for conducting on-line MySCEmployee training

Organizational Impact Assessment Worksheet due to SCEIS AST (sceis-ast@sceis.sc.gov) on Friday, January 8

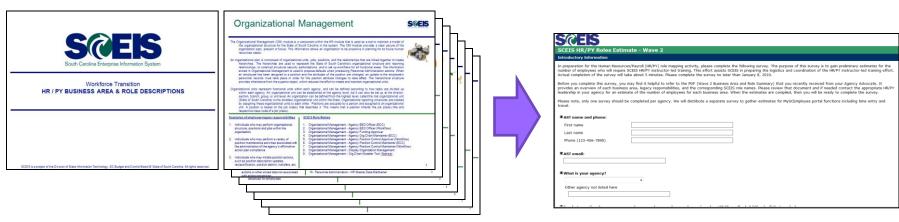


HR/PY Role Count Estimate Survey



Please ensure you complete the HR/PY Role Count Estimate Survey (via SurveyMonkey) by this **Friday**, **January 8**th.

Use the Wave 2 Business Area & Role Summary document to assist with the estimates. If needed, please also use the Role Descriptions and Organizational Impact Assessments.



(Wave 2 Business Area & Role Summary)

(HR / PY Role Estimates – Wave 2 Survey)



Workforce Transition Best Practices



- Impacts: Identify impacts to employees early (through the Organizational Impact Assessments), especially regarding MySCEmployee functionality.
- **Deadlines**: It is imperative to meet the due dates set forth for role mapping. Training and Security designations depend upon role mapping, therefore please submit all activities by the due date.
- Communication: Utilize SCEIS materials and Manager Toolkit to communicate process changes to employees before training.
- Proper Documentation: Only use the worksheets distributed by the SCEIS team for role mapping.



Workforce Transition Best Practices, cont.



- Appropriate Manager Approval: Please make sure the appropriate managers are role mapping employees to SCEIS roles. Accuracy is paramount
- Role Descriptions: Thoroughly review the role descriptions and the responsibilities associated with each SCEIS role. Be sure to contact your Agency Advocate with questions
- Individual Transition Plans: Ensure ITPs are distributed and discussed with employees





SC BUDGET AND CONTROL BOARD

Role Description Document





Organizational Management



Agency EEO Officer (ECC)

Description The Agency EEO Officer (ECC) role allows direct system update for SHAC related fields on a position. This role also has the authority to update employee related data in Personnel Administration such as ethic origin, disability, and Veteran's Status. This role is intended for an individual at an agency who may perform a variety of position maintenance activities associated with the administration of the agency's affirmative action plan compliance or must have the access to make position and/or employee changes to ensure compliance.

> It should be noted that this role is approved to enter data and make changes directly into the system and not through a workflow process that provides the opportunity for approvals and oversight. Therefore, the agency may need to consider other review measures (such as reports) to ensure accuracy and regulatory compliance requirements of the information entered.

- ECC (Enterprise Core Component; Back End)

Tasks/Responsibilities

- Administer the agency's affirmative action plan compliance
- Update ethnic origin, disability, Veteran's Status information on an employee record
- Update SHAC fields on position
- · View and generate reports on SHAC information

Those assigned this role should not be assigned the following roles to prevent conflicts of interests and to allow for segregation of duties:

Role Dependencies

Those assigned this role may also be assigned the following roles:

- Display Non-Sensitive HR.
- Display Organization Management

Expected Training Courses

Total Training Hours: 19

Course Title: COR120 SCEIS SAP Enterprise Core Component (ECC) Overview and Navigation (1hr)

Course Title: OM100 SCEIS Organizational Management (OM) Overview (1hr)

Course Title: OM200 SCEIS Organizational Management (OM) Create/ Maintain Org Units, Jobs, and Positions

Course Title: HR100 SCEIS HR/Payroll Enterprise Structure (1hr)

Course Title: WF100 SCEIS Workflow for Organizational Management (OM) (1hr)

Key Transactions

PO13 - Position

PO13 - Actions for Position

S AHR 61016376 - Salary According to Seniority

S PH9 46000217 - Statistic: Gender by Service Age

S PH9 46000218 - Statistics: Gender Sorted By Age

S AHR 61016152 - EEO-1 Report

PA20 - Display HR. Master Data PA30 - Maintain HR Master Data Key Infotypes

0077 - Additional Personal Data (Change/Update) 9001 - Additional Position Attributes (Change/Update) And, Displays EEO related Infotypes (Review Only)



Description of the role



Tasks / Responsibilities of the role



Roles this role are in conflict with, and that cannot be assigned





Role Description Document, cont. SCEIS





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assignments

Anticipated Training for this role

Key SAP Transaction Codes (T-Codes) and Infotypes used by this role.



MySCEmployee Role Mapping



- @ General Employee Self-Service (ESS) role will be automatically assigned to <u>all</u> employees
- Agencies need to assign the following roles:
 - Employee Self-Service Time Entry
 - Employee Self-Service Traveler
- Manager Self-Service role mapping will be automatically mapped based on manager/supervisor designation in HRIS



Proposed Role Mapping Process



- Review role mapping documentation and outline questions. Send questions to SCEIS AST mailbox (sceis-ast@sceis.sc.gov).
 - Note: Additional information has been added to the Imaging Role Descriptions and Organizational Impact Assessment. Updated Organizational Impact Assessments and Role Descriptions will be provided for the Role Mapping workshops.
- SCEIS will schedule workshops to assist agencies with role mapping. Format and dates are TBD. Advocates and Functional Team will provide role explanations and answer questions related to roles.



Proposed Role Mapping Process, cont.

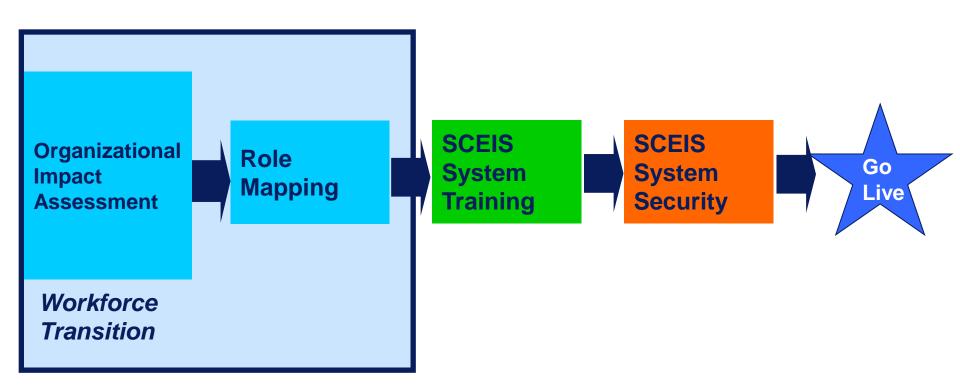


- AST Leads and designated managers complete Role Mapping Worksheet, using the Organizational Impact Assessments, process flows, Business area and role summary, and Role Description documents
- Send completed Role Mapping Worksheets to Advocates at sceis-ast@sceis.sc.gov
- Obtain sign-off from agency



Workforce Transition to Training







Communications & Agency Support





*CB Training Best Practices



- © Complete role mapping activities according to the schedule. This will allow employees to receive their Individual Transition Plans before registration begins.
- Promote early class registration. This allows employees to enroll in classes that fit their schedule and agencies to balance work schedules.
- © Encourage employees to take the required prerequisite on-line training. Employees will be better prepared for instructor-led courses.



B Training Best Practices, cont.



- © Encourage employees to take their required instructor-led classes in order. Employees lose some of the value of the courses if they are not taken in the proper sequence.
- © Encourage employees to attend classes so that they can get their proper access to SCEIS production at go-live.



SCEIS Training Facilitator Roles & Responsibilities



- Support SCEIS end-user instructor-led training sessions as a "subject matter expert" for that functional area and provide student assistance during class
- Ouring training, be able to answer questions to help end-users understand how the process will change with SCEIS (bridge the gap between current state and future state) and provide instructor support as needed
- Attend train-the-trainer events and activities, including preparation course. Conduct self-study activities, as needed
- Provide insight into South Carolina processes and procedures including agency examples
- Serve as support for agency
- Provide post go-live on-the-job training (as needed)



SCEIS Training Facilitator Benefits



- © Empowers agency to support implementation efforts and take ownership for employee readiness
- Increases SCEIS knowledge within agency
- @ Builds capacity within the agency to support business functions after the initial SCEIS implementation
- Quickens the on-boarding time of new hires who need to use SCEIS as part of their job
- Increases ability to provide on-the-job support to agency personnel in order to increase productivity after go-live

If able to support SCEIS Training, please send employee name(s) and contact information to SCEIS Training (training@sceis.sc.gov).



Agency Support Team & MySCEmployee Tammy Mainwaring, EC&C Lead





B Agency Support Team Structure



Agency Support Team Sponsor

Agency Support Team Lead

Agency Support Team Members

- Workforce Transition
- Communications
- Training
- Finance
- Materials Management
- Human Resources
- Payroll
- BI Reporting
- Technical



ROB AST roles and responsibilities



Communications

- © Distribute SCEIS Project communications and promotional materials throughout the agency
- © Coordinate SCEIS Project events within the agency to ensure participation and attendance by affected staff as identified by the AST Sponsor, Lead and/or SCEIS Project Team
- Work with SCEIS Project communications team to maintain awareness of the most current project-related messages and activities



B AST Communication Agents



- Continuous learned: Additional agency-specific resources are needed to support the communication and distribution of information within each agency.
- @ Identify agency staff who can assist the SCEIS Communications Team in the distribution of key materials.
- Individual should be from the HR/Payroll Community and/or the agency's Public Information Office.
- © Expected time commitment is less than five hours per month.
- Please provide the name(s) of agency communication agent to <u>sceis-ast@sceis.sc.gov</u> by **January 18**.
- AST Communication Agent kick-off meeting will take place in February.



AST Communication Agents - Role and Responsibilities



Communication Agents will work with the SCEIS Communications Team throughout implementation of the HR/Payroll project to:

- Disseminate project information throughout their agency
- Identify speaking opportunities to educate state employees about the SCEIS HR/Payroll project
- Identify and communicate to the SCEIS Communications
 Team the need for supplemental communications support materials
- Maintain knowledge and use of updated communication messages by working with the SCEIS Communications Team

Note: The SCEIS Communications Team will develop materials that will be distributed throughout the agencies.



R Communication Tools



The SCEIS Communications
Team will create timely and
relevant HR/Payroll messages for
distribution. These messages will
be packaged and distributed as
part of communications toolkits.



Toolkits may consist of:

- Key messages specific to each phase of the project
- Brochures, posters and other collateral
- Custom communications for agency newsletters
- Communication vehicle recommendations



Upcoming Communication Activities



- Oistribute facilities survey to AST Leads and HR Directors on January 7 (due on January 19)
 - Asking for assistance in identifying potential facilities to be used for the regional road shows across the state
- Objective MySCEmployee article to all agency employees week of January 11.
 - Article will be sent this week from Mike Sponhour to agency Public Information Officers or from SCEIS to AST Leads for agencies that do not have PIOs.
- Provide agency with an employee communication that offers a high-level overview of MySCEmployee



Upcoming Communication Activities, cont.



- Conduct a series of regional MySCEmployee road shows throughout the state
 - During the February-May timeframe
 - More information will be presented at the Communications Agent Kickoff meeting
- Objective Distribute first Communications Toolkit in February
- Continue to provide updates/enhancements to SCEIS website



MySCEmployee – **Employee Self Service**



MySCEmployee functions include the ability to:

- Enter and submit time for manager approval
- Access pay statements
- Maintain bank details for direct deposit
- Submit leave requests
- View various leave quotas/balances
- Display, change, copy or cancel existing travel plans
- Manage addresses and emergency contact information
- Search for other state employee's contact information



My Time



My Pay



My Career



My Personal Information



My Employee Search



My Travel



My Benefits



MySCEmployee Tips for Success



- © Ensure employees attend scheduled regional road show presentations (The SCEIS team will review and work to accommodate any special requests agencies may submit after reviewing the regional schedule.)
- @ Identify a communications agent or SCEIS facilitator who distributes information about MySCEmployee.
- © Encourage employees to take the online, self-paced MySCEmployee training courses.





My Time



My Pay



My Career



My Personal Information



My Employee Search



My Travel



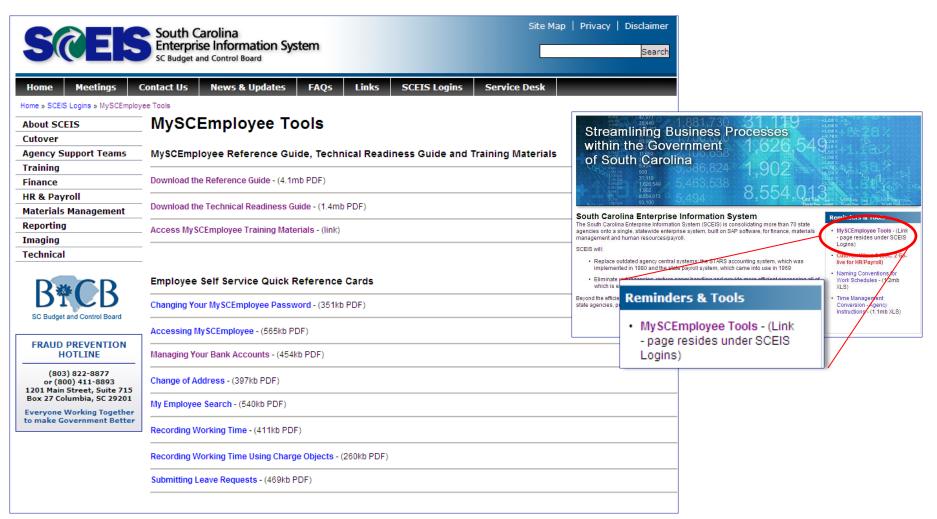
My Benefits



MySCEmployee Tools Page



http://sceis.sc.gov > SCEIS Logins





MySCEmployee Training



Note: MySCEmployee courses are currently under revision and not available on the SCEIS website

- © ESS 100 MySCEmployee course Overview including information on: My Employee Search, My Pay, My Benefits, My Personal Information and My Career (1 hour)
- © ESS 110 Time Entry course Information on how to compile a timesheet, for those employees who will be using this functionality (1 hour)
- MSS100 MySCEmployee Manager Self-Service course Manager overview including how to review and approve time and approve leave requests. Managers will learn how to view employee information, and view and print reports (1 hour)
- TV120 Travel Management Overview Information for employees and managers on how to request and approve travel and travel reimbursement (1 hour)



MySCEmployee Training Approach within Agency



- 1. Attend MySCEmployee Road Show(s) for your agency
- Determine agency approach for communicating MySCEmployee training information to employees
 - Role mapping will be needed for Time Entry and Traveler roles prior to communication on training
- 3. Utilize Communications Agents and Agency Training Coordinators to promote MySCEmployee within the agency and encourage completion of training
- 4. Attend SCEIS MySCEmployee Facilitator session
- Provide employees with a link to the on-line MySCEmployee courses
- Facilitate a series of in-person training sessions to support completion of courses
- 7. Help to track MySCEmployee training completion
- 8. Attend Live Meeting sessions for time entry and time approval



MySCEmployee Agency Preparedness



- Identify if employees have the basic computing skills needed to access and navigate within MySCEmployee
- Determine options for providing employees who need basic computer skills training prior to start of Wave 2 training.
- For employees who do not have access to a work or home computer, recommend creating work stations or kiosks (shared computer/printer) at central agency locations to allow for greater employee access.



MySCEmployee Agency Preparedness, cont.



- Consider any additional workload that may fall upon the agency if employees do not utilize MySCEmployee. For example, time administrators may still collect employee timesheets but they will have the additional step of entering them into SCEIS.
- Refer to the ESS & MSS Organizational Impact Assessment for further information.



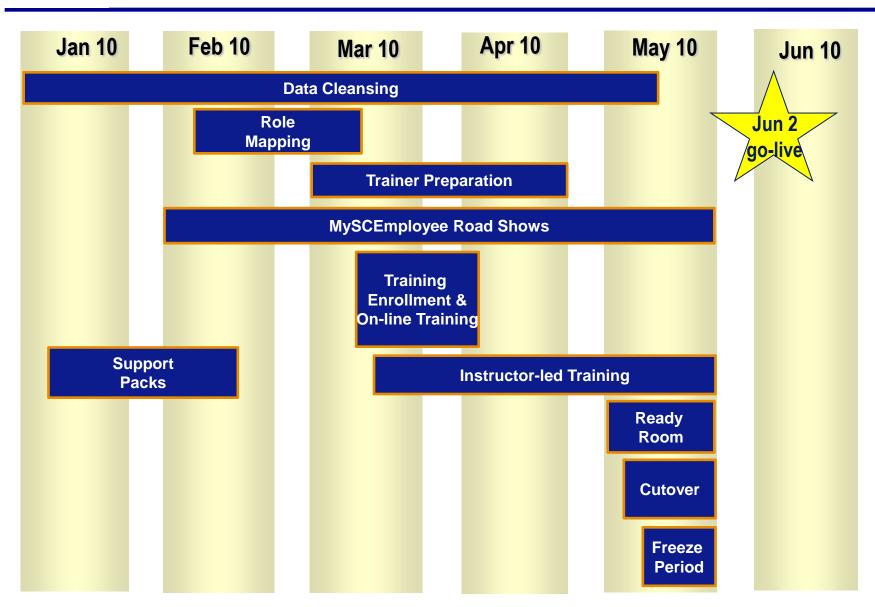
Timeline & Upcoming Activities Tammy Mainwaring, EC&C Lead





Proposed Wave 2 Milestones







Upcoming Activities



- Complete Lessons Learned survey today, or via SurveyMonkey (http://www.surveymonkey.com/s/VB6NSDK)
- Organizational Impact Assessment (Excel) and Role Count Survey (SurveyMonkey http://www.surveymonkey.com/s/2X3LDC9) due Friday, Jan. 8
- Provide the name(s) of agency communication agent to sceis-ast@sceis.sc.gov by January 18
- Facilities Survey (SurveyMonkey http://www.surveymonkey.com/s/MPKP87K) due January 19



Upcoming Activities, cont.



- Oetermine ability to support SCEIS training, and send agency employee contact information to training@sceis.sc.gov
- © Distribute MySCEmployee article to all agency employees week of January 11